FAX TRANSMITTAL FORM

INPUT

PICCADILLY HOUSE
33/37 REGENT STREET, LONDON SW1Y 4NF
TEL: (01) 493 9335 TELEX: 27113
FAX: (01) 629 0179

DESTINATION : MOUNTAIN VIEW

FAX NUMBER :

ATTENTION : ANDREA

Telephone Number/Location

NUMBER OF PAGES: 1 of 7

CONFIDENTIAL CORRESPONDENCE: YES NO ✓

URGENT : YES ✓✓✓ NO

DESCRIPTION

Andrea – a status report for you on our conference – sorry about the tight timescales we're giving you.

Peter is working on his actions now – will be able to give you something tomorrow.

Please let me know if there are any problems.

Carol

****

FROM : CAROL NICE

DATE : 1 November 1989.

INPUT: London

Project Charge Code:

CHANGES TO CONFERENCE AGENDA

1. PRESENTATION 1 - TOTAL SERVICE SOLUTIONS FOR THE 1990s - replace with:

KEYNOTE - Globalisation of Information Services Markets

Peter Cunningham, INPUT President, will discuss the rapid development of a global market for information services and recommend appropriate actions for vendors interested in worldwide presence.

2. SOFTWARE AND SUPPORT SERVICES - THE NEXT DECADE

Please delete the following phrase: 'the market for processing services'

Thanks!

PRESENTATIONS - STATUS REPORT

1. Welcome - Please prepare a header sheet and one slide with Keith's name and job title.

2. Keynote - Globalisation - NO SLIDES! - Just header sheet with Peter C's biog.

3. Systems Integration - 75% of this presentation will use existing slides. Peter Lines needs to trim the set used for your conference and add a few of his own

4. Prof. Ser. Henry has his set to check - Thank you

5. Turnkey - Mike has his set to check - Thank you

6. S/W and support services - Peter Lines to originate

7. Systems Operations - Again will use 75% existing slides

8. Network Services - Tim will get rid of some of his slides

9. Mergers and ACquisitions - PLEASE USE EXACTLY THE SAME SET AS WAS USED FOR YOUR CONFERENCE. CHANGE THE HEADER SHEET TO READ PETER CUNNINGHAM. SLIDES JJ89MR1-46

10. Europe and Information Services - our guest speaker - you have the set to copy.

11. Conclusions - Peter Lines to originate - only 4/5 anticipated.

PLEASE COULD YOU MAKE SOME COPIES OF THE CONFERENCE EVALUATION FORM - DOUBLE SIDED ON COLOURED PAPER LIKE YOURS

PLEASE COULD YOU MAKE 200 COPIES OF THE 'QUESTION' FORM - ON COLOURED PAPER (DIFFERENT FROM EVALUATION FORM) - NO NEED TO INCLUDE IN THE BINDER.

Delegate list - we will organise here.

INPUT's Ninth Annual Executive Conference
Computer Software and Services Markets

CONFERENCE AGENDA

Wednesday, 15 November, Day 1

TAB		
	8:30 a.m.	*Registration and Coffee*
	9:30	*Welcome*—Keith Hocking, Vice President, Managing Director
1	9:40	**Keynote: Globalisation of Information Services Markets**—Peter Cunningham, INPUT's President, will discuss the rapid development of a global market for information services and recommend appropriate actions for vendors interested in worldwide presence.
	10:30	*Coffee*
2	11:00	**Systems Integration Markets in the 1990s**—The fast growth of this market in Western Europe and the U.S. is a clear indication of the demand for total service solutions. Peter Lines, INPUT's European Research Director, and Peter Cunningham will examine the dynamics of this opportunity, in particular the skills required for effective participation.
3	12:00	**The Professional Services: Opportunities**—The key component of service solutions is the provision of skilled people. Henry Trull, an INPUT Principal Consultant, will review this sector and its growing importance.
	12:45	*Lunch*
4	2:15	**Total Service Solutions: Turnkey Systems**—The provision of complete hardware and software systems that provide a standard or partly standardised solution to a user's application represents a significant marketing challenge. Mike Ratcliffe, an INPUT Principal Consultant, will describe this sector, its competitive dynamics and its overall significance as a market opportunity.
	3:00	*Tea*
5	3:15	**Software and Support Services: The Next Decade**—Providing total service solutions demands availability of software and service components. Peter Lines will review the software products market and the need for innovative support services.
	4:00	*Tea*
6	4:15	**Systems Operations (Facilities Management) Markets in the 1990s**—Once considered a limited opportunity in Western Europe, the market for systems operations is now emerging as a key opportunity for growth. Peter Cunningham and Peter Lines will describe INPUT's view of the strategic significance of this sector.
	4:45-5:30	**Discussion Forum**
	5:45-7:30	*Cocktail Reception*

Thursday, 16 November, Day 2

TAB

8:30 *Coffee*

7 9:30 **Network Service Markets: Towards 2000**—The provision of application and electronic information services over networks is one of the most challenging opportunities facing the industry over the next decade. Tim Stevens, an INPUT Senior Consultant, will identify the structure of this apparently confusing marketplace, highlight key opportunities (such as EDI), and define vendor requirements for successful participation.

10:15 *Coffee*

8 10:45 **Mergers and Acquisitions in the Computer Software and Services Industry**—Peter Cunningham will focus on the implications of M&A in the computer software and services industry. Strategies of the major vendors, probable changes to industry structure, preferred acquisition methods, historical results and the outlook for continuing merger mania will be discussed.

9 11:30 **Europe and Information Services Strategy**—Sergio Utili, Vice President, Finsiel Group, will present his observations on the software and services industry in Europe. He will discuss how companies must now look towards the whole of Europe for their markets.

12:15 *Lunch*

10 1:45 **Conclusions/Observatory 2000**—Peter Lines will present conclusions to the 1989 Conference and will describe INPUT's plans for the 1990 research programme. The impact of the Single European Market Initiative and the continuing dynamics of the software and services industry will be related to clients' research requirements over the next decade.

2:15-3:00 **Discussion Forum**

QUESTIONS FOR DISCUSSION FORUMS

Wednesday 15 November - 4.45 - 5.30 pm
and
Thursday 16 November - 2.15 - 3.00 pm

My Question to: _____

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is: _____

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_____

Name: _____

Company: _____

Please hand to any INPUT staff member before the Discussion Forum

THANK YOU.

1989 Annual Executive Conference

Questions for Discussion Forums

Wednesday 15 November—4:45 to 5:30 pm
Thursday 16 November—2:15 to 3:00 pm

My question to: _____

_____

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is: _____

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Name: _____

Company: _____

Please hand to any INPUT staff member before the Discussion Forum

Thank You.

(SSEM/1989)

Welcome

Keith Hocking
Vice President, Managing Director
INPUT

Keith W. L. Hocking
Vice President
Managing Director

PROFILE

CAPABILITIES

- Mr. Hocking has twenty-three years in the computer industry in systems analysis, marketing, sales, and management.

BACKGROUND

- Mr. Hocking is Managing Director and Vice President for INPUT, Ltd. and INPUT s.a.r.l. responsible for directing operations in Europe.
- Prior to joining INPUT in 1980, he was the Managing Director of Deltak Ltd., responsible for the planning and achieving of sales, personnel, and profit goals.
- From 1967 to 1972 Keith Hocking was Field Sales Manager for Philips Electrologica Ltd. selling a range of business mini-computers. He was also a senior systems analyst for Philips, responsible for designing a wide range of commercial computer applications for customers.

EDUCATION

- B.Sc., A.R.C.S., Royal College of Science, Imperial College, London.

Henry Trull
Principal Consultant

PROFILE

CAPABILITIES

- Mr. Trull has 20 years experience in the computer industry.

BACKGROUND

- Mr. Trull spent over five years working in the processing services sector, both for Baric and for Comshare and three years with Hoskyns as a senior consultant responsible for education and training services.
- As an independent systems consultant, Mr. Trull was a leading authority on systems development and quality assurance.
- In addition to conducting assignments in various European countries, the Middle East, and North and South America, he spent six years working in Spain both as a consultant and as I.T. director for a ~~leading group of Spanish marketing communications~~ MULTINATIONAL GROUP OF MARKETING COMMUNICATIONS COMPANIES.

EDUCATION

- Higher National Diploma - Mathematics, Statistics, ~~and~~ Computing, AND OPERATIONS RESEARCH.
- Advanced Diploma, Computer Technology.

Peter Lines
Director, European Research

PROFILE

CAPABILITIES

- Peter Lines has twenty-three years of experience in the computer industry. He currently has responsibility for all of INPUT's European Programme research and custom consulting. He specializes in analysis and forecasting of major trends in the computer software and services business in Western Europe.

BACKGROUND

- With INPUT since 1983, Mr. Lines originally set up the Western European Market Analysis Programme for the computer software and services business. Subsequently he took management responsibility for all research in Europe, including INPUT's Customer Services Programme and custom consulting assignments. Mr. Lines became a Director of INPUT, Ltd. on the 1st January 1988.

- Prior to INPUT, he was with Sperry Computer Systems' UK subsidiary where he held a variety of posts, including those of Regional Software Support Manager, Regional Marketing Support Manager and Marketing Planning Manager.

- Mr. Lines commenced his career in the computer industry in 1966 with English Electric Computers (subsequently ICL), as a systems analyst.

EDUCATION

- B.Sc. (Economics), London School of Economics

Mr. Sergio Utili
Vice President - Planning and Control
Finsiel S.p.A., Rome - Italy

Profile

Capabilities

Mr. Utili has been in the Information System Business since 1967. His experience ranges from internal development of system within large organization, to system marketing and sales and general management.

Background

- Since 1987, Mr. Utili has been in charge of the Planning and Control within Finsiel, the largest software and service Group in Italy.
- From 1983 to 1987 he was in Finsiel, the parent company and holding, the largest industrial conglomerate in Italy, in charge of the Group Information System of IRI.
- From 1981 to 1983 in Selenia, leading electronics and space company in Italy, as Director of Information Systems and Organization.
- From 1970 to 1981 in Alitalia, as Manager of the System Development. Also involved in the sale and support of Alitalia application software to nine major international carriers.

Education

- University of Naples, Department of Electrical Engineering.
- Stanford Graduate Business School, Stanford University, California.

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CONFIDENTIAL CORRESPONDENCE: YES NO

URGENT : YES VVV NO

DESCRIPTION

Sergio Utili's profile

(A) - From 1983 to 1987 he was in charge of the spring Syn. of IKI, KINSKI'S holding Comp. and the largest ... etc.

Hope the rest is clear.

****

FROM : CAROL

DATE : 6 NOVEMBER.

INPUT:

Project Charge Code:

1989 ANNUAL EXECUTIVE CONFERENCE

EVALUATION FORM

We ask for your help in evaluating the conference. Please complete this brief questionnaire and return it to any of the INPUT EUROPE staff at the end of the conference session or leave it on the table outside the meeting room. Thank you!

Company Name___ Your Name (Optional) _____

Please rate the following presentations on a scale of 1 (poor) to 5 (excellent):-

WEDNESDAY, 15TH NOVEMBER		PRESENTATION	USEFULNESS OF MATERIALS
1)	Globalisation of Information Services Markets	_____	_____
2)	Systems Integration Markets in the 1990s	_____	_____
3)	The Professional Services: Opportunities	_____	_____
4)	Total Service Solutions: Turnkey Systems	_____	_____
5)	Software and Support Services: The Next Decade	_____	_____
6)	Systems Operations (Facilities Management) Markets in the 1990s	_____	_____

Comments on the above sessions: _____

_____

_____

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THURSDAY, 16 NOVEMBER		PRESENTATION	USEFULNESS OF MATERIALS
1)	Network Service Markets: Towards 2000	_____	_____
2)	Mergers and Acquisitions in the Computer Software and Services Industry	_____	_____
3)	Europe and Information Services Strategy	_____	_____
4)	Conclusions/Observatory 2000	_____	_____

Comments on the above sessions: _____

_____

_____

Please rate the following on a scale of 1 (poor) to 5 (excellent):-

_____ Quality and usefulness of material presented

_____ Overall format of the conference

_____ Hotel accommodations

_____ Responsiveness of INPUT Staff

_____ Seminar Location

_____ Overall conference rating

In order to provide maximum benefit to your company, what is your preferred month and location for this conference in 1990?

What did you like most about the conference? _____

_____

_____

What did you like least about the conference? _____

_____ _____

_____

What changes/improvements would you suggest? _____

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1989 Annual Executive Conference

EVALUATION FORM

We ask your help in evaluating the conference. Please complete this brief questionnaire and return it to any of the INPUT Europe staff at the end of the conference session or leave it on the table outside of the meeting room.

Thank You

Company Name: _____

Your Name (Optional): _____

1. Please evaluate each session/presentation:

Scale: 1 (poor) to 5 (excellent)

Wednesday, 15 November	**Presentation**	**Usefulness**
Keynote: Globalisation of Information Services Markets	____	____
Systems Integration Markets in the 1990s	____	____
The Professional Services: Opportunities	____	____
Total Service Solutions: Turnkey Systems	____	____
Software and Support Services: The Next Decade	____	____
Systems Operations Markets in the 1990s	____	____

Comments on the above sessions

_____

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Thursday, 16 November	**Presentation**	**Usefulness**
Network Service Markets: Towards 2000	____	____
Mergers and Acquisitions in the Computer Software and Services Industry	____	____
Europe and Information Services Strategy	____	____
Conclusions/Observatory 2000	____	____

Comments on the above sessions

_____

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_____

2. Please rate the following: Scale 1 (poor) to 5 (excellent):

Overall quality and usefulness of material presented	____
Overall format of conference	____
Responsiveness of INPUT staff	____
Hotel accommodations	____
Conference location	____
Overall conference rating	____

3. In order to provide maximum benefit to your firm, what is your preferred month and location for this conference in 1990?

Preferred month _____

At what location _____

4. What did you like most about the conference?

_____

_____

_____

5. What did you like least about the conference?

_____

_____

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6. What conference changes/improvements would you suggest?

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7. What topics would you like covered in future conferences or research reports?

_____

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Thank you for completing this evaluation.

(SSEM/1989)
M&S631/02-10/89